

Report on the Session, 'The Basics of Investing' at SGX on 19.11.2019

Introduction

An International Industrial Visit to Singapore was organized for MMS and MMM/MFM Programmes students from 16th to 21st November 2019. Twenty-four students accompanied by Dr. Smita Jesudasan, Dr. G Ramesh, Ms. Bloswita Rodrigues participated in the international industrial visit to Singapore. The visit to SGX Academy (Singapore Exchange Academy) on 19.11.2019 facilitated the students to attend a session on 'The Basics of Investing' in a global financial market, i.e., Singapore. Mr. Puah Soon Lim, CFA, conducted the session. The session covered the Ecosystem of the Singapore Stock Market, Investment Goals, Investment Products, Model Portfolio and Portfolio Rebalancing Techniques based on Singapore financial products.

Objectives of the Session

1. To understand the fundamentals – the 'why' and 'how' of investing
2. To gain broader perspectives and insights into the world of investing in Singapore

Topics Covered

- What are blue-chip stocks? Learn more about their characteristics.
- What are REITs? Learn more about their characteristics, the typical REIT investment strategies in Singapore, the REITs landscape in Singapore, the different categories of REITs and their selection criteria
- What are ETFs? Why should we invest in them?

About the Speaker

Puah Soon Lim, CFA, graduated from the National University of Singapore with a bachelor's degree in Business Administration. He is also a CFA. Soon Lim has more than 20 years of experience in the financial and investment industries, spanning from money broking, merchant banking, bond sales and trading, investment planning, insurance sales and management of a wealth management sales team. His last decade was spent in a stockbroking firm's wealth management unit. He is currently the Associate Director of an Independent Financial Advisor. He works with both individual and institutional investors to provide customized advice on optimal asset allocation. His extensive experience and thorough knowledge in wealth management enable him to break down complex concepts into easy-to-understand components.

Student Participation List

Title	Surname	Given name (as per passport)
MR	KURUTHUKULANGARA	ALWIN SHAJI
MS	SAWANT	APURVA AMOL
MR		ASHISH RAVEENDRAN
MS	KINNY	CRESSET FRANCIS
MS	PATEL	DRASHTI KAMLESHKUMAR
MS	RAUT	GAURI VIVEK
MR	SHAH	HARSH BHARAT
MR	RODRIGUES	HAYDEN HUDSON
MS	ALVA	HEERA MARIA
MR	DSOUZA	JAMIE
MS	NAIK	KAVITA TUKARAM
MR	MORAES	MELROY VALERIAN
MS		NEHA THOMAS
MS	NUNES	RENAL DENIS
MS		RHEA SUSAN GEORGE
MS	D'SOUZA	ROINA JOHN
MR	SHAH	SHAHEN MANOJ
MS	BATHIJA	SHEETAL GOPAL
MR	PADROO	SHUBAM
MR		STEVE CHACKO
MS	DMELLO	SUZAN RONALD
MR	SHAH	VIRAJ SANJAYKUMAR
MS	BHOGATE	VRUSHALI NARAYAN
MR	RODRIGUES	SEAN

Outcomes of the Session

1. To comprehend the core building blocks for a stock portfolio, including Blue Chip Stocks, REITs and ETFs.
2. To analyze the advantages of Blue-Chip Stocks, REITs and ETFs and their practical application strategies.

Session of 'Basics of Investing' at SGX on 19.11.2019



Participation Certificate Distribution at SGX on 19.11.2019



Felicitation of the Speaker Mr. Puaah Soon Lim, CFA on 19.11.2019

